



**Maryland
Philanthropy**
NETWORK
Advancing Impact

Grantmaker's Fundamentals Series | Part 4

June 16, 2022

Agenda

- Beyond Grantmaking: Maximizing Grant Impact
- Break
- Managing Your Grant Portfolio
- Continuing to Learn

Introductions

- Name
- Organization
- Role
- Check in question: What feels important today?
- Call on the next person



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Maximizing Grant Impact

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Leveraging Strategies

Definition

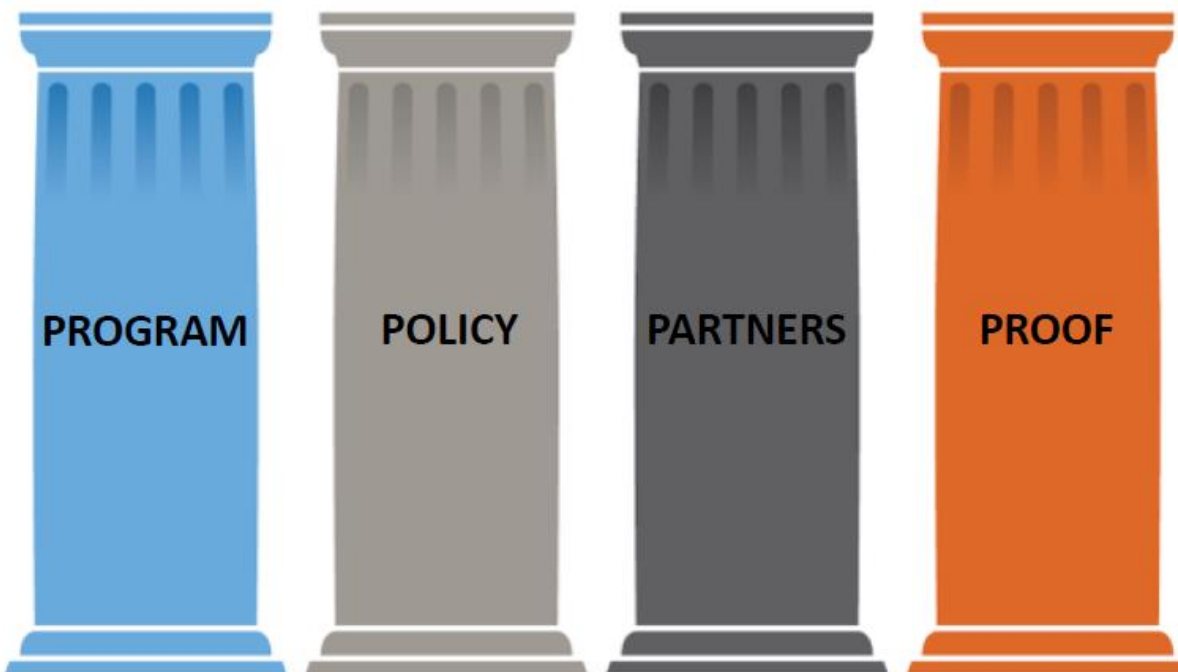
Methods that augment grantmaking in order to accomplish or maximize the goals of individual grants, grant portfolios, or the foundations overall goals and mission.

Types of Leveraging Strategies

Strategy	Description
Advocacy	Informing and influencing individuals, legislators, and public sector officials' opinions and actions on matters of public policy
Capacity building	Improving the effectiveness of a nonprofit organization. Approaches include providing training and development sessions, supporting strategic planning or the development of evaluative measures, coaching, supporting collaboration, etc.
Change-agent leadership	Assuming a leadership role by initiating a funding initiative, providing challenge or seed funding, and/or supporting leadership development.
Collaborating	Partnering with other grantmakers, grantees or stakeholders to address an issue, support a cause, solve a problem, etc.
Convening	Assembling stakeholders around an issue or cause for relationship-building, learning exchange, etc.
Diversity, Equity, & Inclusion	We believe it is imperative for philanthropy to become more diverse, inclusive, and equitable in its practices in order to advance the common good; increase effectiveness; and enhance impact.

Types of Leveraging Strategies

Strategy	Description
In-kind, pro bono & volunteer services	Providing free human capital, expertise, services, and material goods in order to strengthen nonprofit organizations and/or assist in delivering services.
Mission-related investments (MRI)	A strategy through which foundations invest their capital in companies that align with their mission and values.
Program-related investments (PRI)	A strategy through which foundations provide organizations with access to inexpensive capital to use to pursue their goals and build their financial management capacity.
Research and knowledge creation	Theoretical and applied research studies and projects designed to increase knowledge, inform thinking, and produce learning.
Strategic communications & public education	Strategic messaging to further a cause. Approaches include branding, letters to the editor, publications and other media strategies, etc.



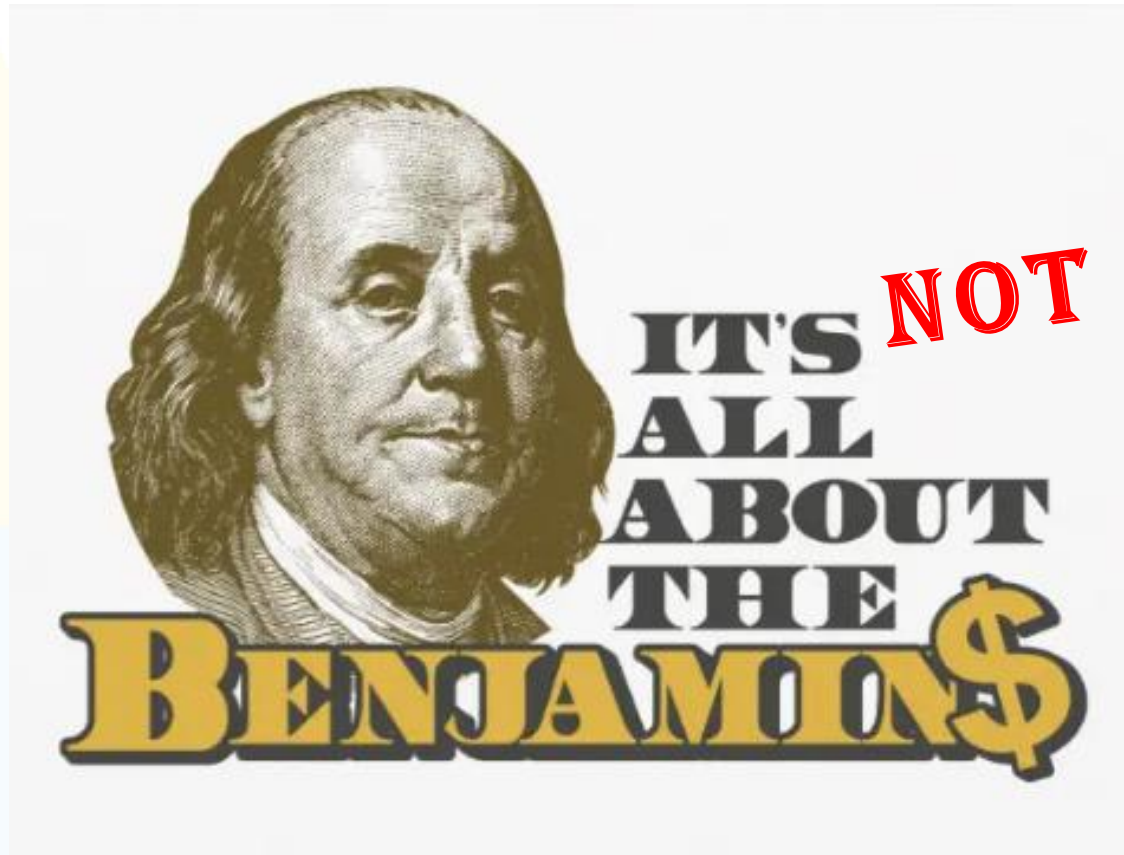
To Leverage or Not to Leverage

Each foundation will choose what is right for its philosophy, capacity, and inclinations.

Foundations can play various roles – from active leadership roles (e.g. hosting a convening) to less active roles (e.g. attending a convening)

Why Do Anything Other Than Make Grants?

- ▶ A desire to maximize the impact of a foundation's relatively small funding role
- ▶ The recognition that most problems are complex, and may benefit from multiple approaches
- ▶ An intent to learn, take advantage of, and benefit from philanthropy's unique position



Source: <https://www.zazzle.com/store/raggedshirts>

Advocacy

- ▶ Advocacy means to influence opinions and actions on matters of public policy or concern.
- ▶ We have misconceptions about what is legal or appropriate.
- ▶ What you can do:
 - advance an idea
 - argue a position
 - fund research or evaluation
 - broaden the dialogue
 - bridge the gap between foundations and government
 - help nonprofits become advocates in their field

What is Advocacy?

Public
Education

Community
Organizing

Educate
Legislators

Research

Nonpartisan
Voter
Education

Organize a
Rally

Litigation

Conferences

Regulatory
Efforts

Trainings

Partisan
Political
Activity

Lobbying

Lobbying is...

Direct

- › A Communication
- › To a Legislator
- › Expressing a view about specific legislation

Grassroots

- › A Communication
- › To the general public
- › Expressing a view about specific legislation
- › And a Call to Action

Private Foundations can lobby freely on self-defense issues related to philanthropy but face heavy taxes on lobbying expenditures related to other issues, such as Education and the Environment

A little activity...

- ▶ As CEO of my nonprofit, I meet with the Secretary of Labor. I tell him the new proposed workplace safety and enforcement rules related to COVID-19 are inadequate and need to be changed. I proceed to tell the Secretary how the rule needs to change. Is that lobbying?

Funders Support Advocacy for Education



The tenacity of the [American Civil Liberties Union \(ACLU\) of Maryland](#) in fighting for more equitable funding for Baltimore schools has brought more than \$1 billion into the city school system and for at-risk children across Maryland in the last decade.

This wouldn't have been possible without funders like the **Jacob & Hilda Blaustein Foundation**, **Abell Foundation**, **Morton & Sophia Macht Foundation**, **Struever Bros.**, **Eccles & Rouse**, **Alvin & Fanny B. Thalheimer Foundation**, **Lockhart Vaughan Foundation**, **Clayton Baker Trust**, **Aaron Straus & Lillie Straus Foundation**, **Open Society Institute-Baltimore** and **The Fund for Change**. These funders have not only supported the ACLU but stayed deeply involved in the nitty-gritty work needed to follow through on the state's commitments to a more equitable school system.

Additional Resources

- ▶ Maryland Philanthropy Network
 - www.marylandphilanthropy.org/public-policy
- ▶ Candid Learning
 - [*Advocacy Funding: The Philanthropy of Changing Minds*](#)
 - [*Teaming Up For Advocacy How To Effectively Use A Collaborative To Drive Change*](#)
 - [*Working with Government*](#)
- ▶ Alliance for Justice
 - www.afj.org
 - [*Lobbying Defined for Private Foundations*](#)

Capacity Building

- ▶ Assess a nonprofit's capacity gap.
- ▶ Project must integrate with whole organization.
- ▶ Before you plan:
 - Assess nonprofit's vision and strategy
 - Assess strength of leadership
 - Individual/Collective
 - Executive/Board
 - Have patience (no quick fixes)
- ▶ Know your goals and theory of change

Capacity Building

› Unrestricted support

- General operating grants

› Organizational capacity-building grants

- Focused on building specific organizational capacities, such as leadership, fundraising, communications, or evaluation

› Capacity-building grants plus technical assistance

- Grant plus support from consultants or foundation staff focused on building specific organizational capacities

› Grants to build capacity collectively

- Build capacity of a group of grantees, networks or other collaborative efforts, instead of the capacity of individual grantees

› Grants to technical service providers, intermediaries or researchers

- Grants or contracts to build the capacities of capacity-building providers or develop knowledge and practice in the field

Source: *Grantmakers for Effective Organizations*, <https://www.geofunders.org/resources/how-can-we-support-capacity-building-efforts-633>

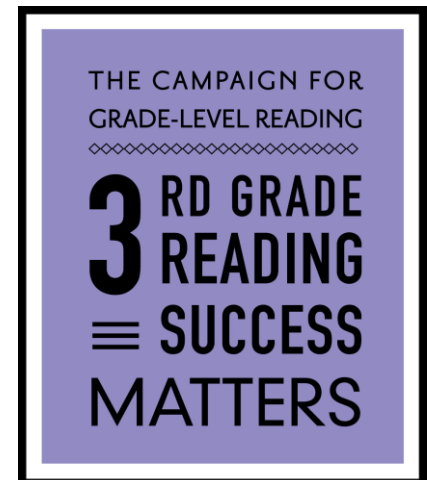
In-Kind, Loaned Executive Services

- ▶ They are a great way of giving in non-financial ways
- ▶ Nonprofits usually need services like this
- ▶ It's smart to be strategic about your services – and to get credit for them
- ▶ It's smart for nonprofits to be strategic about requesting services

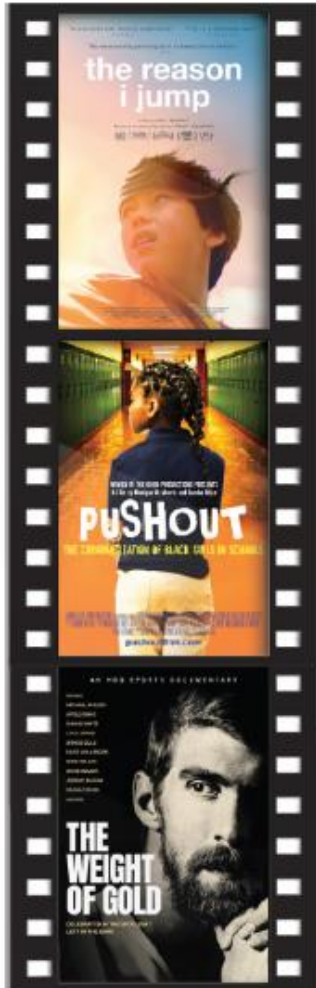
Collaborating

Grantmakers collaborate locally, nationally, and globally – to advance their missions and create impact – with:

- ▶ Grantmakers
- ▶ Grantees and other nonprofits
- ▶ The public and private sectors
- ▶ Others...



Collaborating



MENTAL HEALTH FILM FESTIVAL Movies with a focus on the importance of mental health
OCTOBER 17-22 • FREE & VIRTUAL
SEE FILMS BELOW TO REGISTER

Presented by:
HORIZON FOUNDATION

THE REASON I JUMP • Weds., Oct. 20 at 6 p.m.

This extraordinary film takes viewers on a sonic dive into the interior worlds and fascinating daily experience of the lives of five nonverbal autistic young people. Hosted by Howard County Autism Society

PUSHOUT: THE CRIMINALIZATION OF BLACK GIRLS IN SCHOOLS • Thu., Oct. 21 at 6 p.m.

This documentary illuminates how the adultification of Black girls impacts their mental health and how the collateral consequences feed the school to prison pipeline. Hosted by Columbia (MD) Chapter of The Links, Incorporated

THE WEIGHT OF GOLD • Fri., Oct. 22 at 6 p.m.

This documentary explores the mental health challenges that Olympic athletes often face. The film seeks to encourage people to seek help and highlight the need for readily available support. Hosted by Alston for Athletes

Convening

- ▶ Advance an issue
- ▶ Address a problem
- ▶ Call attention to your grantmaking
- ▶ Celebrate a success
- ▶ Consultative sessions
- ▶ Introduce a new project
- ▶ **And what else?...**

Impact Investing

- ▶ **Program-related investments** (PRIs) provide capital at below-market terms to non-profit or for-profit enterprises whose efforts advance the investing foundation's mission.
- ▶ **Mission Related Investments** (MRIs) align a foundation's investments of its assets with its mission and values.
- ▶ Mission Investors Exchange: www.missioninvestors.org
- ▶ The Case Foundation's [A Short Guide to Impact Investing](#) is easy and fun to read and is accessible for those unfamiliar with mission investing terminology.

Diversity, Equity, and Inclusion

It's About Impact. We believe it is imperative for philanthropy to become more diverse, inclusive, and equitable in its practices for three main reasons:

- 1. Advances the common good.** Those of us in philanthropy have dedicated ourselves to promoting the common good. Advancing diversity, equity, and inclusion in our organizations and grantmaking helps us live up to our values.
- 2. Increases effectiveness.** Incorporating diverse perspectives and focusing on equity within foundations can help build better relationships with grantees, improve team problem-solving, and lead to better outcomes.
- 3. Enhances impact.** Our constituencies, from the communities we serve to our partners in business and government, are becoming increasingly diverse. We need to understand and reflect this rich variety of perspectives in order to achieve greater impact.

Inclusion

“Nothing About Us Without Us”

- ▶ Inclusion is the action or state of including or of being included within a group or structure. More than simply diversity and numerical representation, inclusion involves authentic and empowered participation and a true sense of belonging.
- ▶ Pay as much attention to the retention of professionals of color as we do to leadership pipelines into the sector.
- ▶ Change the culture of philanthropy – meaningful roles & career pathways
- ▶ Provide diverse leaders with the “armor” and supports they need to survive in foundation environments – particularly if they are leaders on issues of racial and social justice.

Horizon Foundation Racial Equity Work

Starting Assumptions

- Disparities are often created and maintained through policies and practices that present barriers to opportunity
- The only way to close equity gaps is with an intentional focus on race
- Work must be done INTERNALLY and EXTERNALLY

Horizon Foundation Racial Equity Work

- ▶ Advancing policies and systems change that promise equitable health outcomes and increasing engagement with diverse leaders.
- ▶ Elevating the voices of leaders from diverse communities in the county to highlight and address health disparities in the community.
- ▶ Building the capacity of community organizations to advocate for health equity.
- ▶ Targeted grants to organizations to have a greater impact in communities of color.

HORIZON FOUNDATION RACIAL EQUITY WORK



Community Kickoff Event



Equity Collaborative Meeting



Equity Summit



Diversity, Equity, and Inclusion

Key Elements in Race Equity/DEI Journey



Race Equity Resources

- ▶ [AWAKE to WOKE to WORK: Building a Race Equity Culture](#)
- ▶ [Embracing Equity: 7 Steps to Advance and Embed Race Equity and Inclusion Within Your Organization](#)
- ▶ [GrantCraft Guide and Resources](#)
- ▶ Candid's [Foundation Landscapes: Racial Equity](#)
- ▶ [D5 Tools & Knowledge from the Field](#)
- ▶ [Racial Equity Tools](#)
- ▶ [Philanthropic Initiative for Racial Equity.](#)

Research and Evaluation

- ▶ **Formal Research Studies** - to gain information to inform grantmaking or contribute to general knowledge about one of your interest/program areas
- ▶ **Applied Research, or pilot programs** - to support a new idea to explore a possible new solution to a problem



Kids

count



KIDS
COUNT

DATA BOOK
STATE TRENDS IN CHILD WELL-BEING



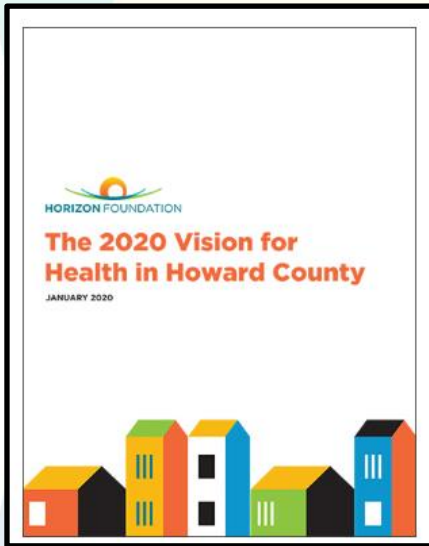
THE ANNIE E. CASEY FOUNDATION

Strategic Communications

- For the purpose of public education
- To make a public stance
- To profile, or call attention to, your grantmaking

2020 Racial Equity Report

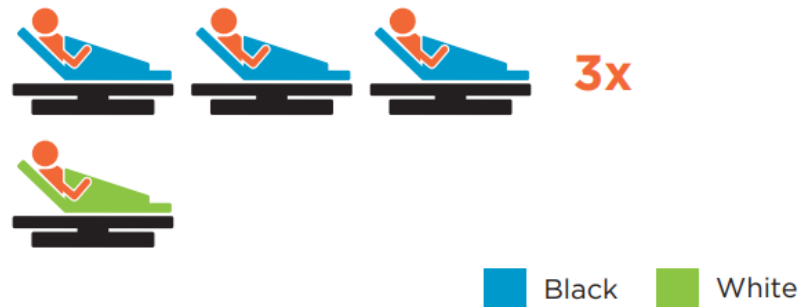
<https://www.thehorizonfoundation.org/new-report-howard-county-faces-stark-racial-health-disparities/>



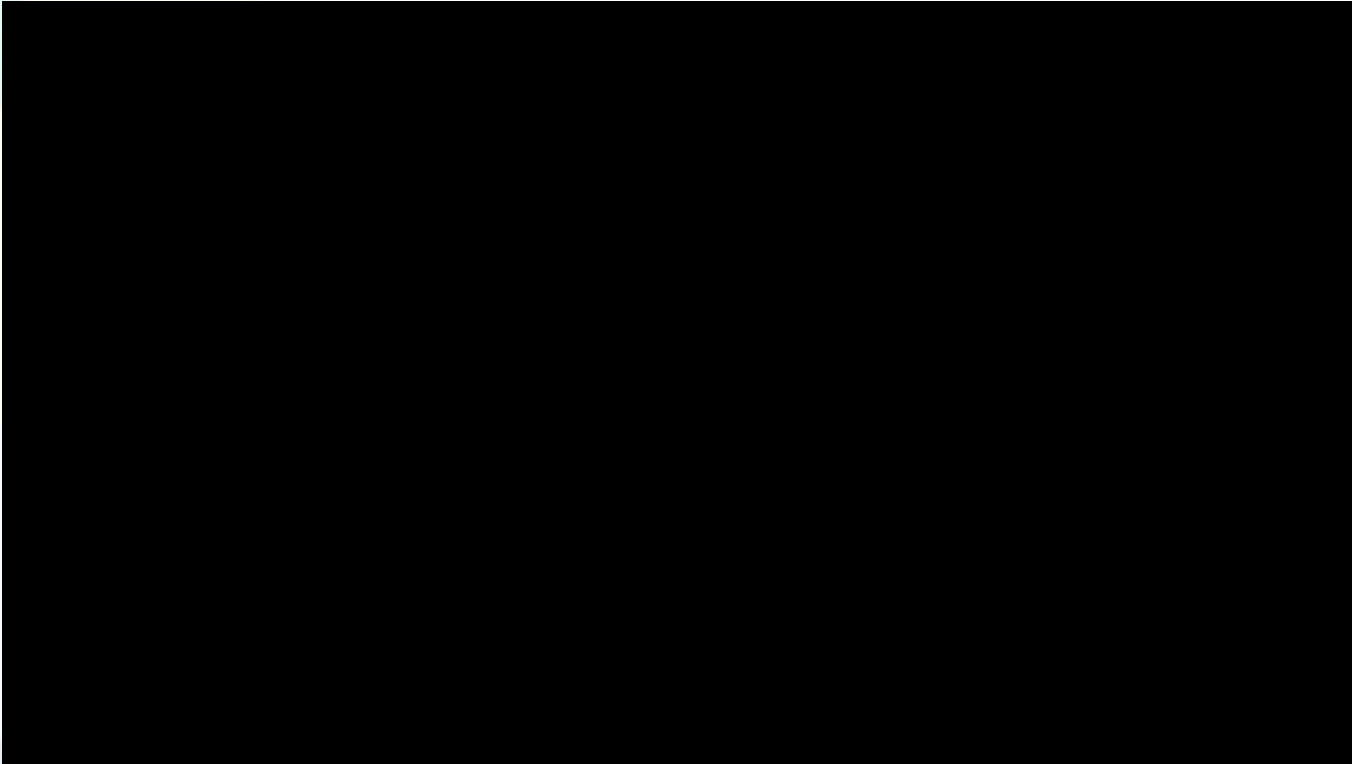
Black patients are four times as likely as White patients to be seen in the emergency department for diabetes (2017):



Black patients are three times as likely as White patients to be seen in the emergency department for high blood pressure (2017):



Strategic Communications





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Questions and Discussion
